

The Balanced Scorecard: *A Quality Assurance System for College Health*

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Overview / Objectives

- Evidence Based Management
- Strategic Planning
- Quality Assurance
- Learning Outcomes and Metrics
- Balanced Scorecard
 - Vision and Mission
 - Objectives and Measures
 - Four Perspectives
- Build a Balanced Scorecard

Evidence Based Management

Health Care Journals

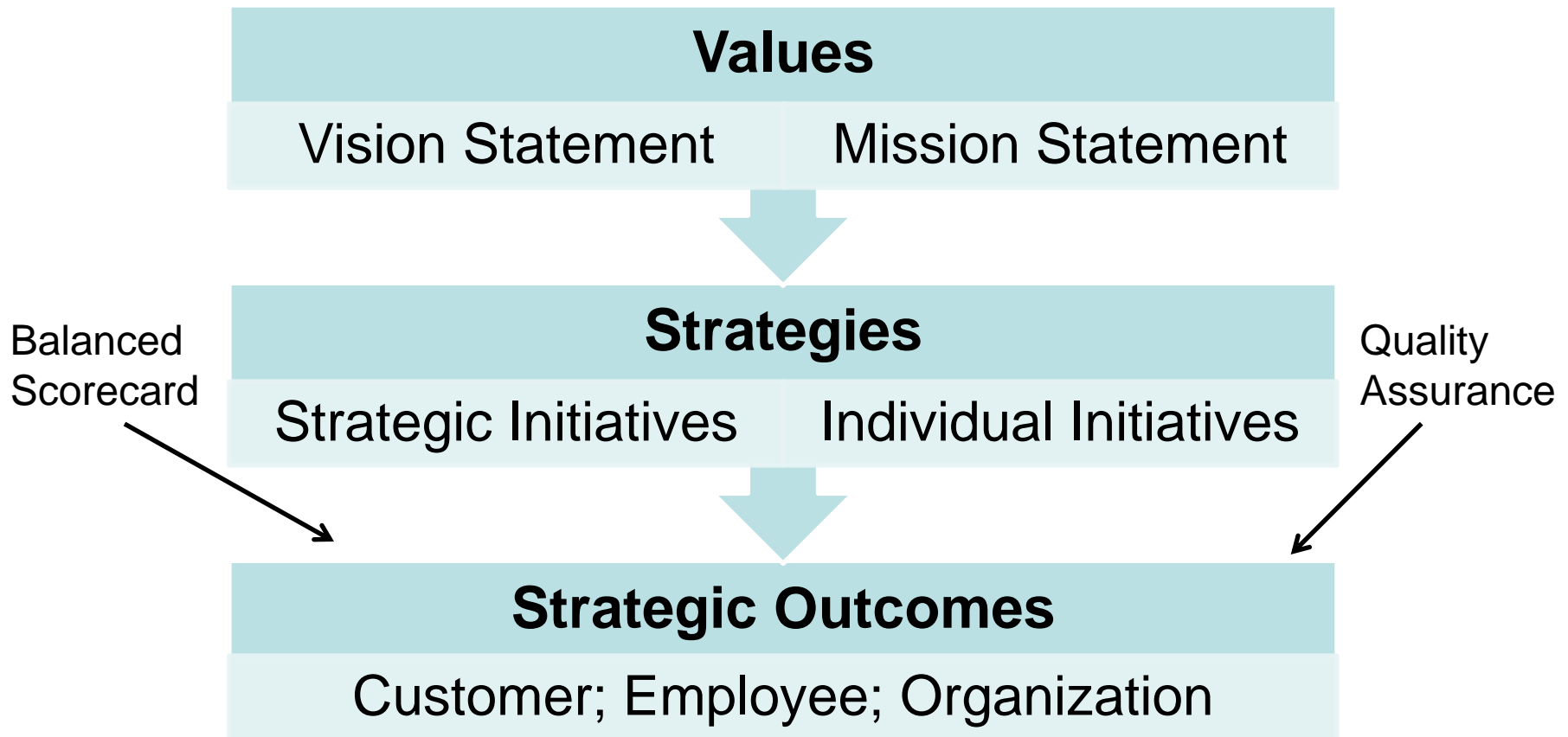
- Journal of the American Medical Association
- New England Journal of Medicine
- Journal of American College Health
- Journal of Primary Care
- Journal of Adolescent Health
- Journal of College Student Psychotherapy
- Journal of Clinical Psychiatry
- American Journal of Health Behavior
- Journal of Infectious Diseases
- Annals of Family Medicine

Health Management Journals

- Journal of Health Care Management
- Journal for Healthcare Quality
- Journal of Health Services Research and Policy
- Journal of Healthcare Resource Management
- Evaluation & the Health Professions
- Health Care Management Review
- Health Care Strategic Management
- Health Policy Health Policy & Planning
- Healthcare Financial Management

Strategic Planning

Strategy is one piece of a continuum...



Quality Assurance

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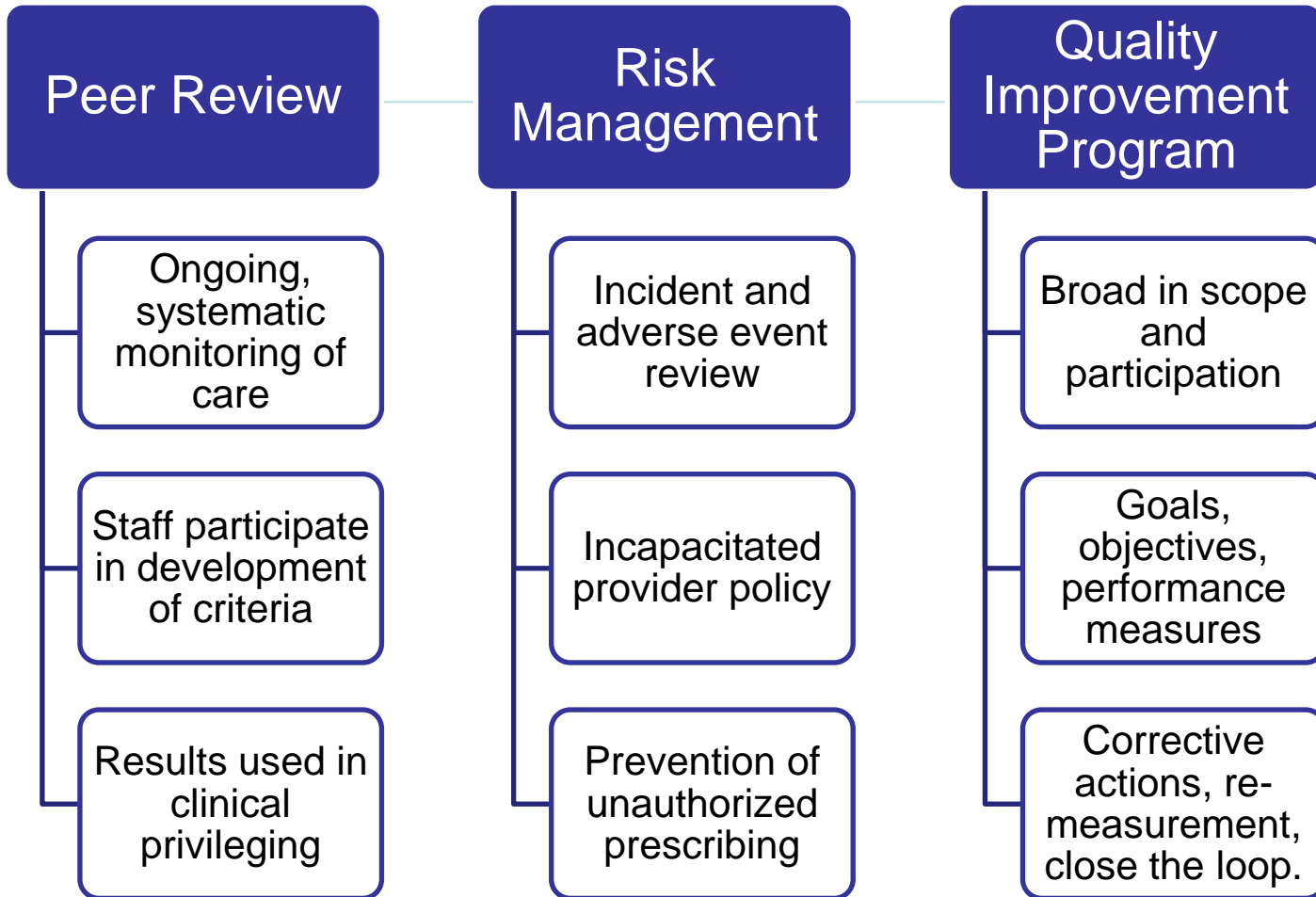


“I have a delivery for you: 1000 pens with the slogan ‘Excellence is in the Detales’ and 500 factory-second, slightly irregular coffee mugs that say ‘Quality Matters’.”

Quality Assurance



Quality Management and Improvement AAHC



Outcomes & Metrics

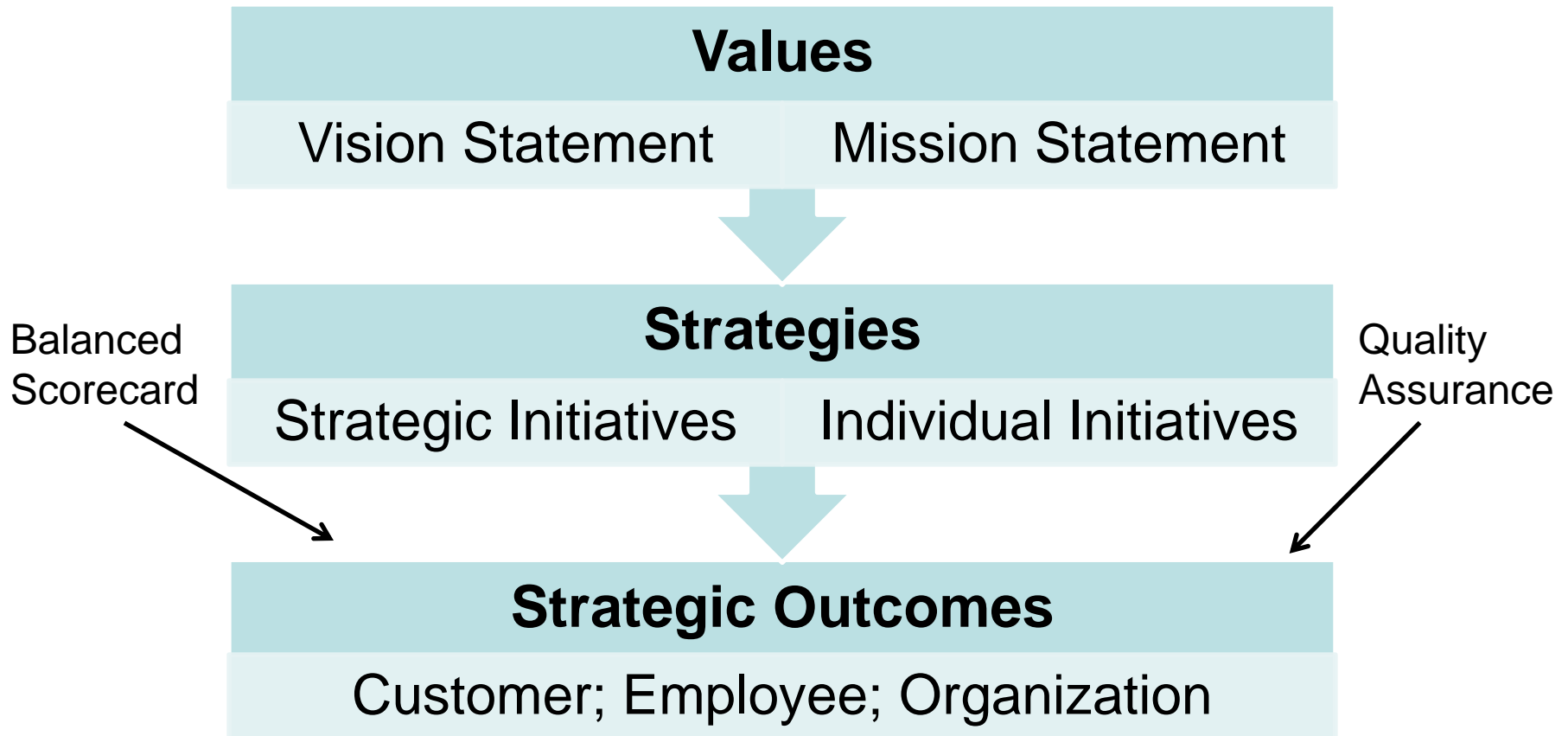
Learning outcomes & Health outcomes

Process evaluation & Outcome evaluation

Qualitative data & Quantitative data

Strategic Planning

Strategy is one piece in a continuum



Balanced Scorecard History

**Measurement
and
Reporting**

1992

**Alignment and
Communication**

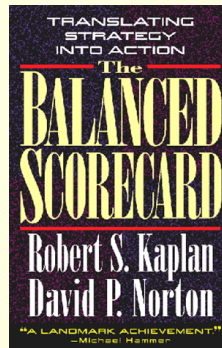
1996

**Enterprise-wide
Strategic
Management**

2000

Articles in Harvard Business Review:

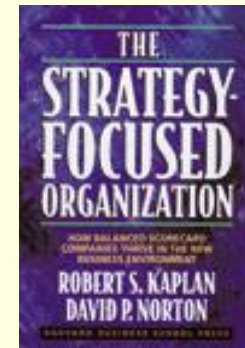
- “The Balanced Scorecard — Measures that Drive Performance” January - February 1992
- “Putting the Balanced Scorecard to Work” September - October 1993
- “Using the Balanced Scorecard as a Strategic Management System” January - February 1996



1996

Acceptance and Acclaim:

- “The Balanced Scorecard” is translated into 18 languages
- Selected by Harvard Business Review as one of the “most important management practices of the past 75 years.”



2000

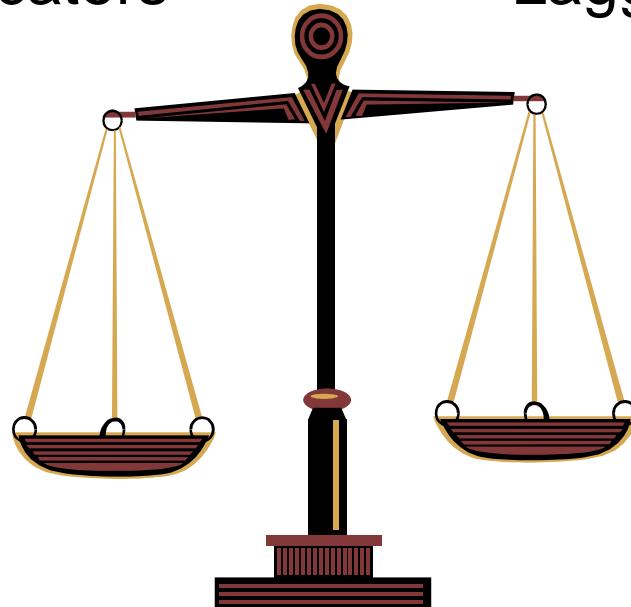
What is the Balanced Scorecard?

Strategic Management System

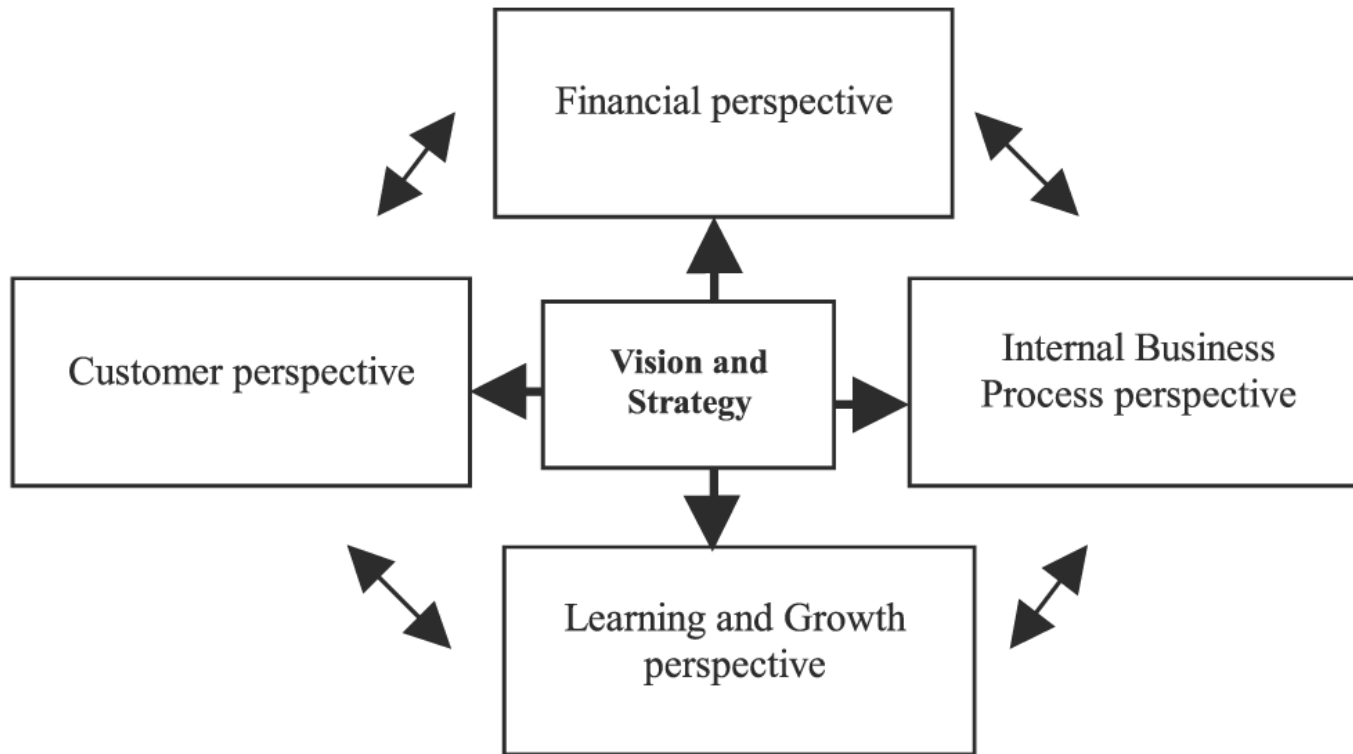
- Directive: Guide the implementation of the vision by translating strategy into objectives and actions.
- Instructive: Provides feedback on outcomes that can be used to modify objectives and actions.
- Systemic: Focus on four (or more) key perspectives.

It's all About Balance

- Financial measures
- Long term goals
- Internal factors
- Leading indicators
- Non-financial
- Short term goals
- External factors
- Lagging indicators



Balanced Scorecard - Overview



Kaplan, R. S., & Norton, D. P. (1996). *The Balanced Scorecard*. Boston: Harvard Business School Press.

Balanced Scorecard - Implementation

Step 1

- Translate vision and strategy into objectives and actions
- Select critical measures

Step 2

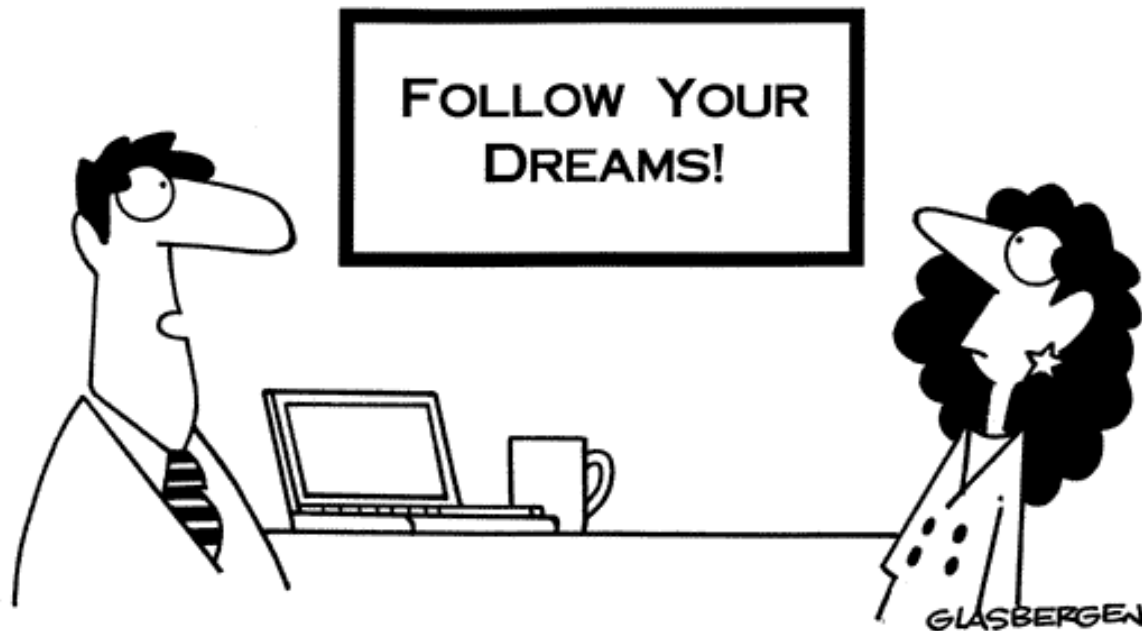
- Communicate and link to individual endeavors
- Motivate staff

Step 3

- Monitor outcomes
- Adjust strategy, objectives and actions as needed

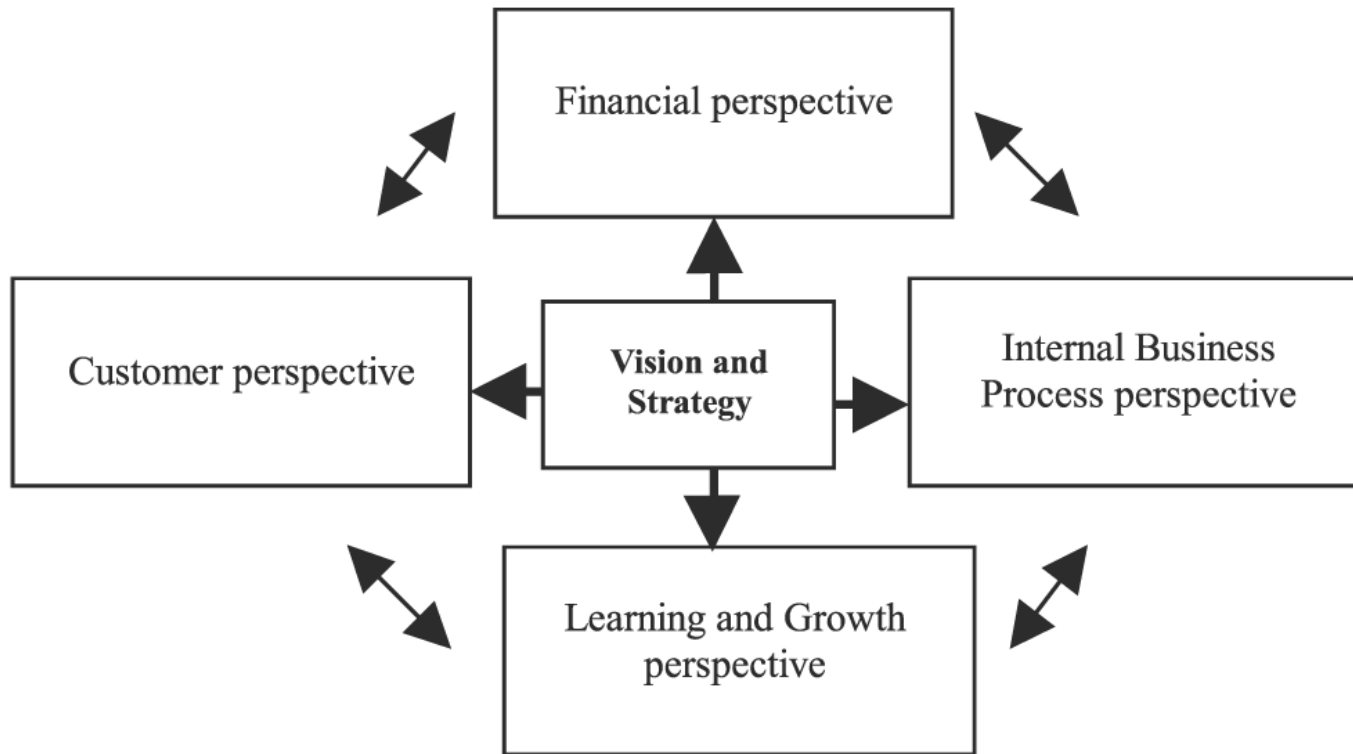
Mission Statement

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“It’s supposed to inspire, but most employees see it as permission to take a nap.”

Balanced Scorecard - Overview



Kaplan, R. S., & Norton, D. P. (1996). *The Balanced Scorecard*. Boston: Harvard Business School Press.

Customer Perspective

Questions:

- How do our customers/patients see us?
- How do we create sustainable value for our customers?
- How is customer demand satisfied?

Objectives	Maintain strong customer satisfaction
Measures	Web-based satisfaction survey
Targets	Overall satisfaction: medical services = 85%; counseling services = 90%
Initiatives	Scheduling w/in 24 hours, on-time or explain, staff introductions, clarify directions

Internal Perspective

Questions:

- What must we excel at?
- What key operational processes are most critical?

Objectives	Increase knowledge about alcohol, decrease risk behaviors, and increase protective behaviors of PRIME program participants.
Measures	Pre- and Post Tests
Targets	Statistically significant changes from pre- to post-test.
Initiatives	PRIME alcohol education class offered to judicially mandated students.

Innovation/Learning Perspective

Questions:

- What can we improve?
- What internal processes need to be enhanced?

Objectives	Maintain an active peer review system for counseling services.
Measures	Consistency between intake notes and diagnosis; suicide assessment where appropriate; appropriateness of care
Targets	90% compliance in all three measures
Initiatives	Peer review of 5 charts per provider at the end of each semester.

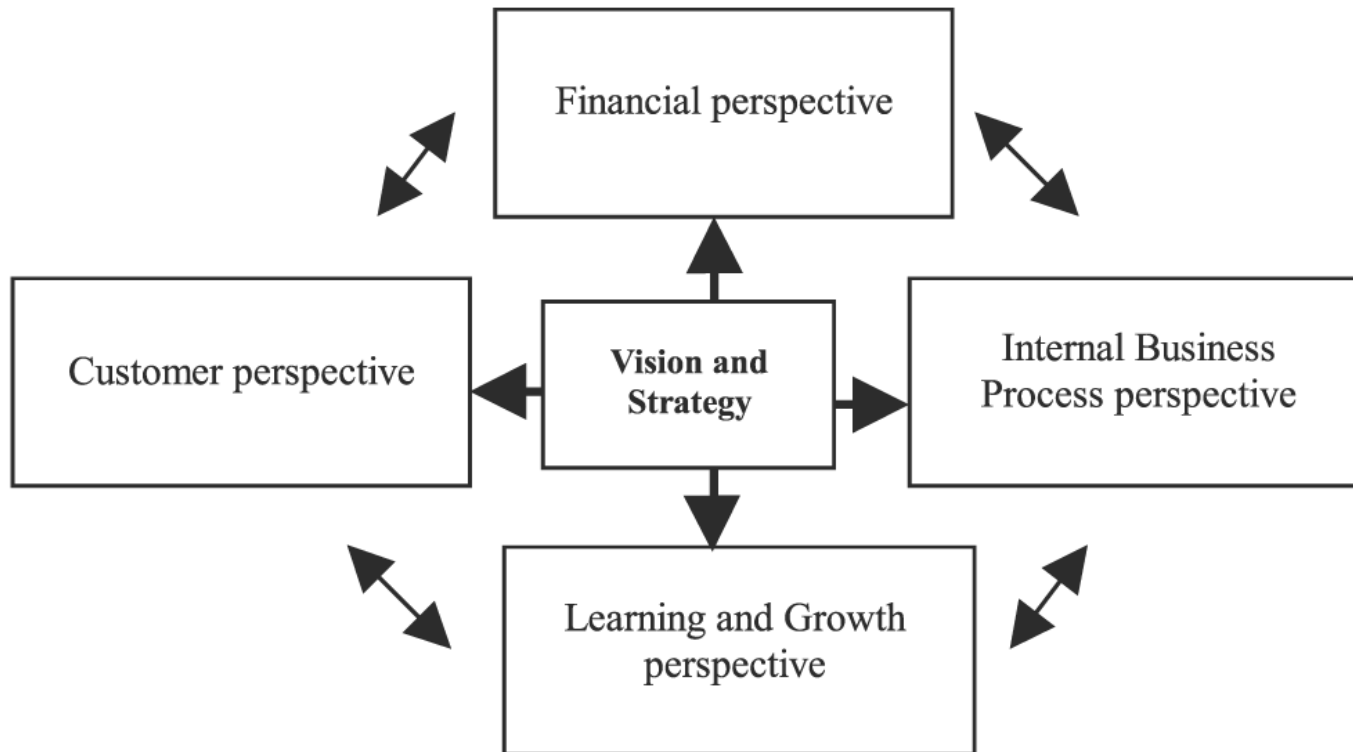
Financial Perspective

Questions:

- What return on investment do we provide our customers?
- What is the value added for the customer?

Objectives	Monitor cost-of-care. Minimize medical supply costs.
Measures	Unit costs of 20 most commonly used medical supplies for 3 vendors.
Targets	Order supplies from most cost-effective source.
Initiatives	Analyzed medical supply costs; Modified ordering where appropriate.

Building a Balanced Scorecard



Kaplan, R. S., & Norton, D. P. (1996). *The Balanced Scorecard*. Boston: Harvard Business School Press.

Balanced Scorecard: Reporting Tool

	Objectives	Measures/Target	Outcome	Action Plan
Customer				
Internal				
Innovation – Learning				
Financial				